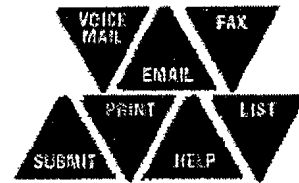




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## PROFILING QUESTIONS RETENTION

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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Select Contact  
Information

Choose From ▼

Select Profiling  
Questions

Choose From ▼

Select Knowledge  
Screening

Choose From ▼

### New Customer Survey #1:

Customer Satisfaction:	
Just wanted to check in with you and see if everything is going smoothly for you as we get started working with you. We don't want things ever to just be okay. We want things to be so wonderful that you'll be telling others about us.	
1. Have we treated you right in making the transition?	
2. Anything I should be watching out for?	
3. Anything you are concerned about?	
4. So I make sure to pay special attention to it, is there anything that you are particularly looking forward to in working with us?	
(Answers will indicate new CEL level or validate that they remain in old one. Note change in level here and any general comments. Primary evaluation here is, has XYZ Company moved past Expectant or Trial levels or not? Does anything need to be done now to ensure that this contact becomes a Loyal customer at a minimum?)	
Industry Trend Information:	
5. Any major changes, trends in your industry and how are they affecting you?	
6. Any major changes, trends in your company and how are they affecting you?	
7. Any many changes, trends in your company's gizmo requirements and how are they affecting you?	

REPLACEMENT SHEET

Figure 51

1070 ↗

Targeting Information:	
9. Where do you get your information about the gizmo industry? (Publications, conferences, trade shows, people.)	
10. Who do you listen to?	
11. Who do you think of as a thought leader? Would XYZ Company be on your list?	
12. If they are not already on it: Would you like to be on our email list for a Free Gizmo Email Tip of the Month?	
13. Add to Contact Information.	



REPLACEMENT SHEET

Figure 52

1080 ↗



## KNOWLEDGE SCREEN BUSINESS INTELLIGENCE

- Interaction**
- Priority Action**
- Search Contact**
- Add Contact**
- Add Relationship**
- Reports**
- Utility**

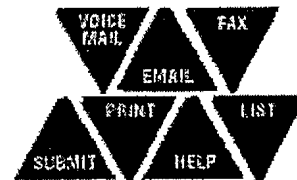


**STRATIX™**  
Relationship  
Tracking  
System

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### Select Contact Information

Choose From

### Select Profiling Questions

Choose From

### Select Knowledge Screening

Choose From

### Acquisition

Date	Saw Marketing Materials	Awareness Level
12/2/00	Yes	Aided Aware

### Closing

Date	Feedback Notes	Awareness Level

### Retention

Date	Survey Notes	Satisfaction Level	Modified CEL Level

### Targeting Research Commentary

Independent study 8/12/00 tested potential for XYZ Company. XYZ relatively unknown, but critical need found with companies that have more than 150 gizmos and over \$100 million in revenue.

Awareness: Unaware

### Tracking Research Commentary

Independent study 12/27/00 rated XYZ Company against its competitors. XYZ being considered more frequently than ABC Company by a ratio of 10:1.

Awareness: Consideration

REPLACEMENT SHEET

Figure 57

Competition
ABC Company

**Individual Correlation With Awareness/Satisfaction Research**

Date	Awareness Level	Satisfaction Level	Existing CEL Level	Modified CEL Level
08/12/00	Unaware		0.000	
12/19/00	Aided Aware		2.040	
12/27/00	Consideration		4.000	



REPLACEMENT SHEET

Figure 58

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